



## VERIS RFP Project Site Visit and Interview Notes

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## VERIS RFP Project Site Visit and Interview Notes

### General Information

**Topic:** Voter Registration / Citizen Portal

### Candidate management

#### Electoral board qualification

Regarding whether the board should be involved in qualifying candidates, the GRs think that's a problematic idea. The various electoral boards have different levels of involvement and their partisan nature makes it difficult to involve them into the process of making sure candidates are qualified and make it onto the ballot.

### Document scanning

The GRs maintain both paper and digital records. Hopper applications, as well as paper applications submitted locally, are scanned.

### Citizen Portal

#### Registration

An "alpha" is the term used by the GRs when they refer to a voter's original application. If a voter registers on the Citizen Portal, the GRs print every application in the hopper.

#### Incomplete

If the voter's alpha card is not complete, the GRs cannot use this application as a current registration. If the voter was registered in another locality and has a completed an alpha card in that locality, the GR can request that original alpha card to complete the registration update in their locality. The original locality doesn't have to perform any action as VERIS takes care of the transfer.

Some voter registrations are an update, rather than a first time registration. When updating, the voter doesn't always answer all the questions.

The questions most often not answered are:

1. Are you a citizen?
2. Are you a felon and or mentally incapacitated? (combined question)



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Voters often leave the answer to question #2 above blank because a “yes” or “no” doesn’t specify which of the two statuses a voter might be. This may also be due to the personal nature of the either status. If the GR’s office can’t read the handwriting on an application, they will call and have the voter fill out another form.

### **Name and gender changes**

Any time there is a name or gender change from a previous registration, court documents must be shown except in the case of a woman’s last name. If the voter brings in the court documents, they are scanned into VERIS so other localities understand the registration updates.

### **Checking for voting restriction status**

During the match process, the voter may be flagged as having a felony conviction, being mentally incapacitated, or deceased.

### **Restoration of rights**

The GRs aren’t comfortable with restoring rights. They are not comfortable because they don’t want to make a mistake related to this and they don’t have the training to do this. The voter may be using a number of different aliases, which are listed on the Secretary of the Commonwealth’s site, and the social security number is connected to those aliases in VERIS. The GRs are concerned about restoring rights to all the aliases. Also of concern is that they feel some felons want to get their rights back because they want to go out and buy a gun, and as elections staff, they don’t want to be seen as supporting this person’s right to buy a gun. The GRs feel that restoration of rights should be a process that ELECT should manage.

When the Governor restores rights, that restoration should show up on the Secretary of the Commonwealth’s site, but it may take 2 weeks to update (unknown why). The voter has to show the letter from the Governor to override the felon conflict in the system. There has been confusion related to recent Governor’s initiatives to restore felon rights - because citizens heard the Governor was restoring rights– but some do not realize there is still the need to register/re-register. The most recent registration law put the responsibility of registering back on the voter.

Also, VERIS does not have a spot to list where the felony conviction happened.

VERIS has an automatic process to check for felon status, but not an automatic process for renewal. There are issues with the staleness of both the felon information and the Secretary of the Commonwealth’s site. If a voter is already registered, this voter will end up in the Felon Hopper.



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### Mentally incapacitated

Some people can be declared mentally incapacitated by the courts, but retain their voting rights. The GRs may get a list from the Clerk of the Courts to have their voting rights removed that includes people who are mentally incapacitated but retain their voting rights. The court shouldn't send a letter to the GRs of those adjudicated "mentally incapacitated" if voting rights have been maintained.

### Third-party registration drives

The organization Next Gen turns in a lot of paper applications.

### DMV

Online DMV records are treated the same way as the Citizen Portal records in VERIS.

### Duplicates

For auditing purposes, the GRs print the Errors and Validations (E&V) report daily or weekly, depending on their workload.

### Administrative Duplicate Registration Match (ADRM)

VERIS automatically matches existing records and flags them as duplicates. This process is a huge time-saver for the GRs.

### Matches with other localities

If a voter matches a voter in another locality, the voter's record ends up in the new locality's hopper. The new locality must do the merge. The last record update overwrites the existing one, even if there is less information available.

### Merge and unmerge

The GRs don't believe they've ever run into a situation where they may have incorrectly merged two different voters and do not know what would happen if they did.

### Registration corrections

Many of the corrections happen at the polling location. The Chief will put the voter on the phone with the GRs at the polls. The voter then provides their SSN to the GRs and tells them the update. The change in VERIS is noted as a correction. If the change is minor (e.g. typo), no notice is sent.

If the GRs receive a new application, the record in VERIS is marked as update. In this case, a notification letter is always sent.



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### Automatic cancellations

If an official communication comes back as undeliverable, the record is placed on confirmation. Once a year confirmation notices are mailed from the state. If an address confirmation is not returned within 30 days, the record becomes inactive. After 2 federal elections with no activity, the state cancels the record. If there is any activity, the record becomes active again and it loses the confirmation flag. All cancellations are handled by ELECT. GRs can “uncancel,” if, for example, a voter was out of town or more than 30 days and contacted the GR’s office upon their return.

### Transfers

It is unclear to the GRs why the transfer hopper appears. It’s always a transfer out and it’s sometimes related to an existing absentee voter, but it’s still unclear. The GRs simply click “OK” to clear the record, but largely don’t understand why this step is needed.

### Finding voter information

#### Suspicious records

The GRs are concerned about voter registrations and absentee ballot requests. For students, the local university has a list of graduates, which highlight potentially problematic records. They also ask the local university liaison and check social media.

There are only about 500 absentee voters so the GRs have the time to investigate. The GRs know some of the voters—or have a way to reach them through a liaison or similar agent—so they get more personalized help that isn’t available to everyone.

#### Viewing registration history

Looking up registration history sometimes helps to find the alpha, but they couldn’t think of a reason why they would need to look at this information.

#### Validating social security numbers

This is not done currently, but the GRs would like access to DMV records. Some localities have access to the DMV software—which they pay for—and some don’t. GRs feel ELECT should pay for this to be standardized.

#### Auto-find prohibited voter list matches

Felon data is updated in VERIS once a month. All handled by ELECT.



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### Voter history

#### Poll list vote history

After the election, from Advocate, the pollbook software, they export a proprietary file (.pollbook file) that is converted into a CSV by PAM, which has to be uploaded into VERIS to assign voter credit to the records. PAM strips off all the additional information that comes out of the pollbook file and leaves only the voter ids for VERIS. This is problematic for assigning credit in primaries because VERIS forces the GRs to create two elections—thereby forcing the creation of multiple files from the pollbook file—and the GRs could accidentally assign voter credit to the wrong voters in a primary.

When an absentee ballot is sent out, even if it's not returned, the voter still gets credit.

### Data sources

#### State-level data updates

The GRs would like more communication from ELECT about the data sources they use to update VERIS records and how they work (e.g. ERIC, Corrections).

#### Death data

Rarely, the data from either the BVS or SSA is wrong and the GRs have to fix the voter records

#### Wednesday packet

All these contents are forms received by the state. As more information gets put online, there is less in the packet. Some of the contents are:

- Confirmations
- NCOAs
- Paper applications
  - Some from social services
- Lists of voters who moved to other states
  - Process for cancellation



## VERIS RFP Project Site Visit and Interview Notes

### Pain points

#### Session timeout

Randomly, the system kicks the users out, even if the user is actively using the system. The system times out too easily and it's inconsistent. Calling for a security code to sign in is cumbersome and worse during critical times.

#### Confirmations

The voter search constantly defaults to SSN even if the last search was another setting (e.g. voter id).

#### Hiding voter registrations

After the voter registration deadline, and the close of books, the GRs would like to see the registrations on hold in the hopper. Sometimes voters come in asking questions about their registrations and the GRs can't see the records.

#### Critical failures

The system often goes down at critical times. This is challenging as everyone is more dependent on scanned documents.

#### Reports

Report generation is slow, especially if one of the larger localities is running their reports.

#### Citizen Portal

Citizen Portal works well for absentee. The Citizen Portal generating paper applications is another story. The Paper OVR Hopper is confusing.

#### DMV registration process

Some registrants often select every option on the voter registration application (e.g. felon with rights restored, protected voter) possibly in a mistaken process to ensure the form is completely filled out.

The application steps should be set up in the system so the application will not be processed if not complete, but also clearly inform applicants about what information and signatures (if applicable) are required. When incomplete applications come into the hoppers, the process and workload that this generates is huge.

#### Processing out-of-state moves

In the out-of-state move hopper (NCOA), if a voter is flagged as having moved out of state, cancel the registration.